

# LOUISIANA

LouisianaTravel.com

## **Oil Spill Research Report National Wave 2**

August 16, 2010

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# Research Overview

## Background

- ◆ On April 20, 2010, there was an explosion and subsequent fire on an oil rig in the Gulf of Mexico. Shortly thereafter, the rig, located 50 miles off the coast of Louisiana, began leaking oil. The Louisiana Office of Tourism wished to assess the impact of the oil spill on perceptions of and interest in visiting Louisiana.
- ◆ The research reported herein details results from the second of two waves of research designed to measure the impact of the oil spill. MDRG conducted the first wave of research in May 2010 with a nationwide sample of respondents, and the second national wave in August 2010.

## Research Objectives

- ◆ Measure current perceptions of Louisiana as a leisure destination
- ◆ Measure intent to visit in the next 12 months
- ◆ Track changes over time

## Methodology

- ◆ MDRG used an Internet panel for the purposes of data collection. The survey was available on MDRG's secure website from August 3-6, 2010, and took an average of 6.8 minutes to complete.
  - The first wave survey was available on MDRG's secure website from May 19-21, 2010, and took an average of 6 minutes to complete.

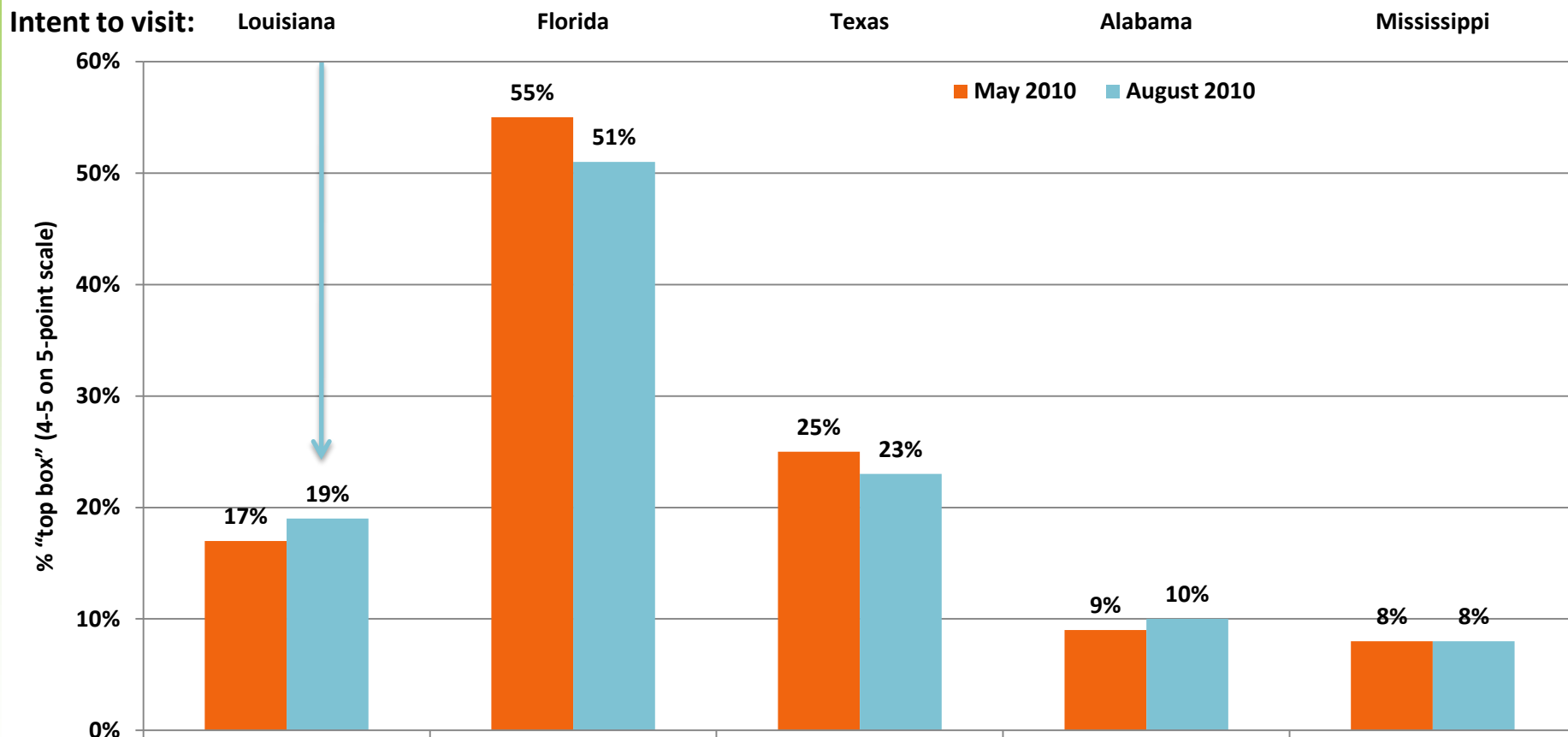
## Sample

- ◆ Respondents were recruited from the e-Rewards Consumer Internet Panel. In order to reflect the target consumer, they were screened to ensure they:
  - Are at least 25 years old
  - Have household incomes of \$50,000 or more
  - Take at least one trip per year that includes a paid overnight stay
  - Either share equally or are the primary decision maker when making leisure travel plans
  - Do not currently live in Louisiana
  - Are not employed in the travel, market research, marketing or advertising industries
- ◆ A total of 1,003 nationwide respondents completed the survey in each wave.

**What can Louisiana (and other Gulf Coast states) expect in terms of visitors?**

# About one-fifth of nationwide respondents said that they plan to visit Louisiana in the next year.

Base: Respondents who do not live in the state  
(n=1003 total in each wave)

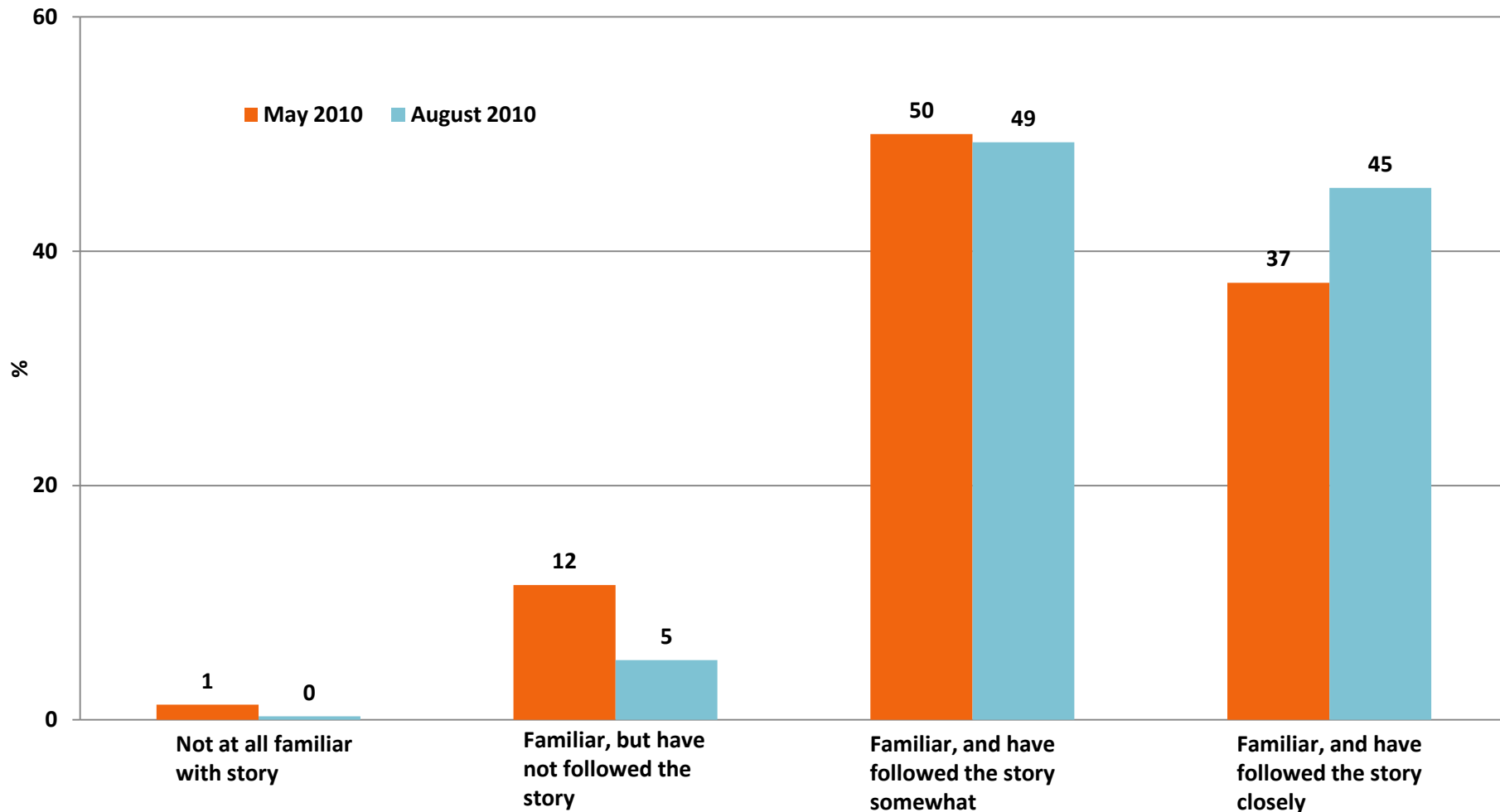


Q2. Using a scale from 1 to 5 where "1" means not at all likely and "5" means extremely likely, please pick any number from 1 to 5 to indicate how likely you are to visit the following states for leisure or pleasure in the next 12 MONTHS:

**Do they know about the oil spill?**

# Nearly everyone is following the oil spill story...

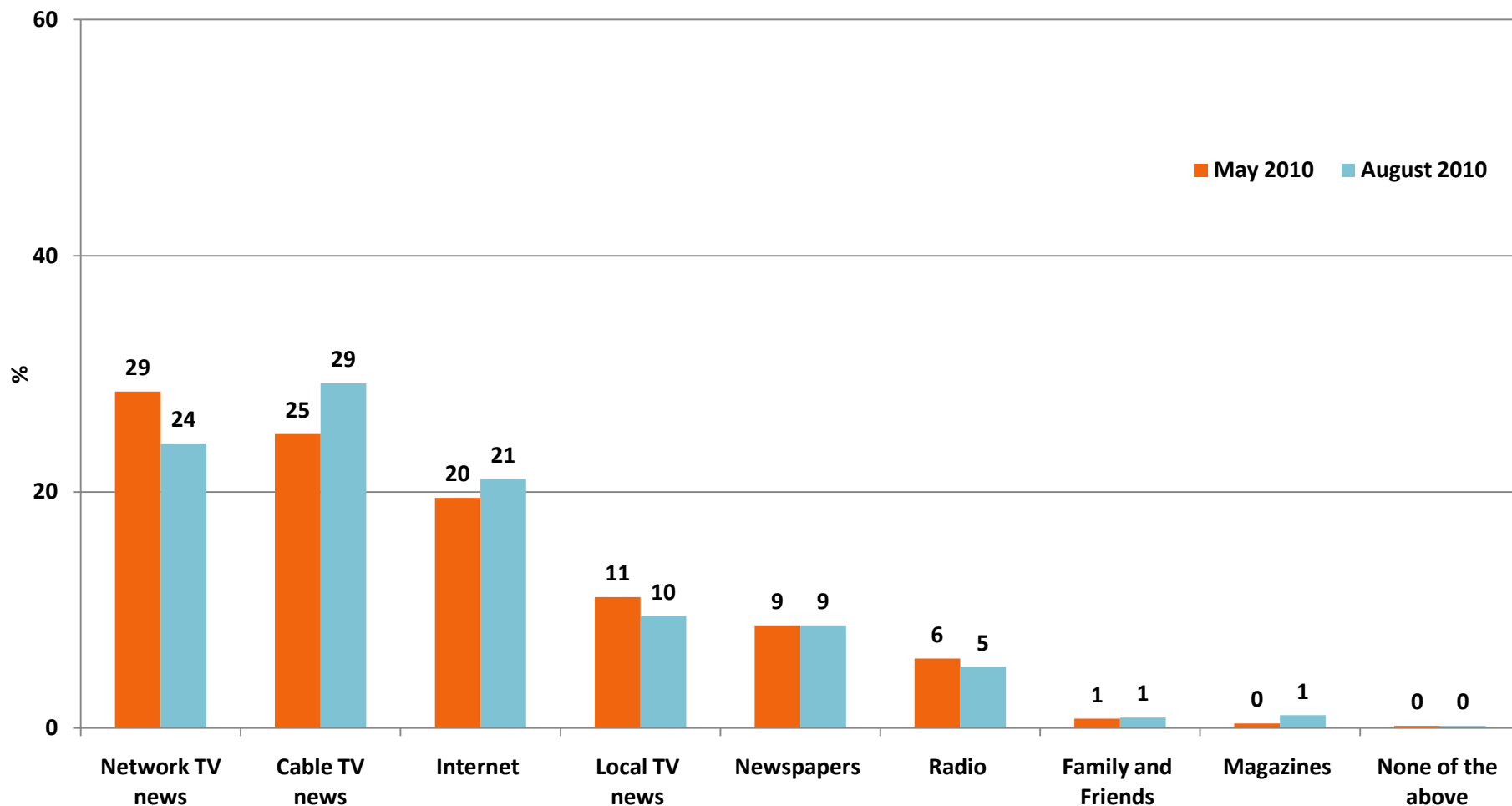
Total Respondents  
(n=1003 in each wave)



Q5. Which of the following statements best describes how familiar you are with the oil spill story in the Gulf of Mexico.

# ...and they follow it on TV and the Internet, although...

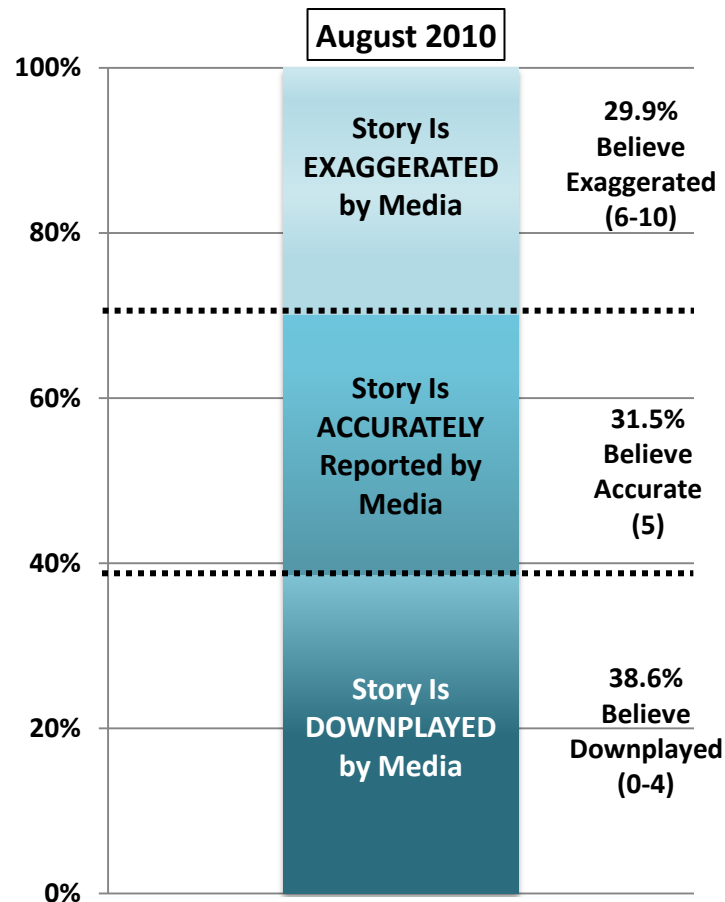
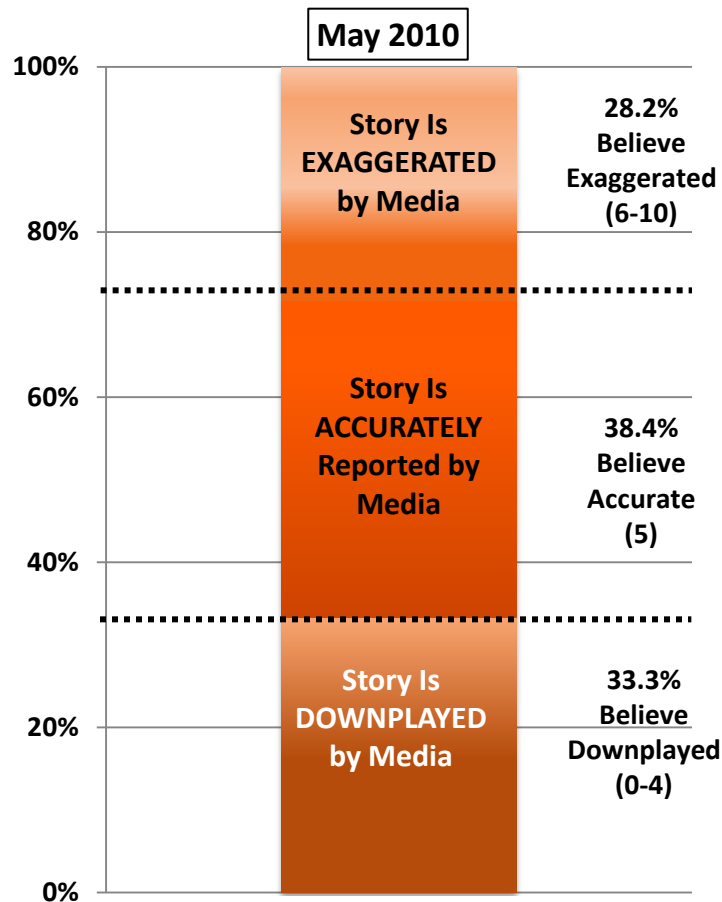
Total Respondents  
(n=1003 in each wave)





# ...Only about 3 out of 10 (32%) believe the story is reported accurately.

Total Respondents  
(n=1003 in each wave)



Q7. Think for a moment about all that you have seen or heard about the oil spill from all news sources, and then rate your opinion using a scale from 0-10 where "0" means the story is being downplayed, "5" means the story is being accurately reported, and "10" means the story is being exaggerated.

0- Being downplayed in reporting    1    2    3    4    5- Being accurately reported    6    7    8    9    10- Being exaggerated in reporting

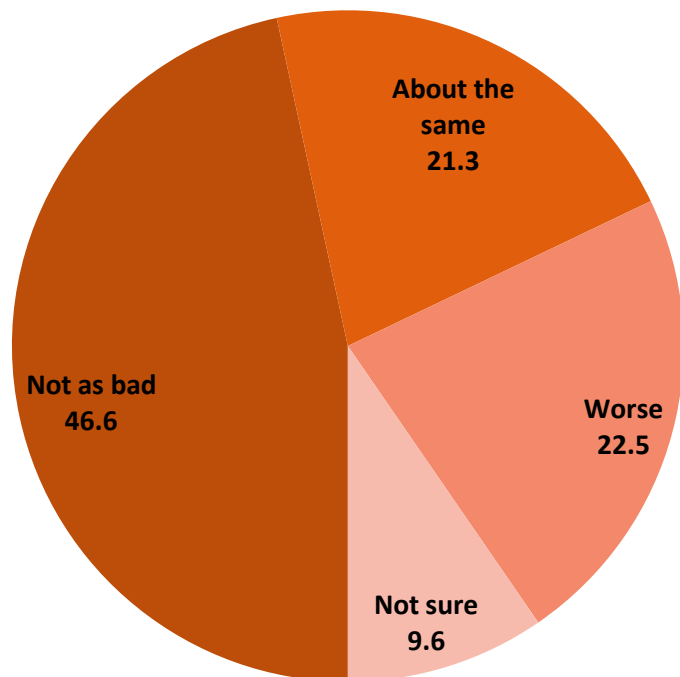
**How bad do respondents think the oil spill has been for Louisiana?**

# Almost half of nationwide respondents believe that the oil spill is as bad or worse than the 2005 hurricanes...

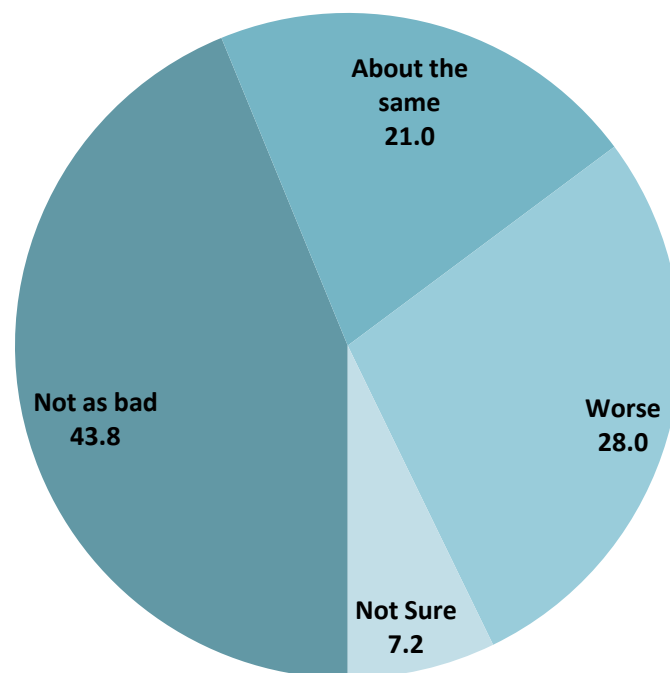
Total Respondents  
(n=1003 in each wave)

Compared to the 2005 hurricanes, the devastation caused by the oil spill is:

May 2010

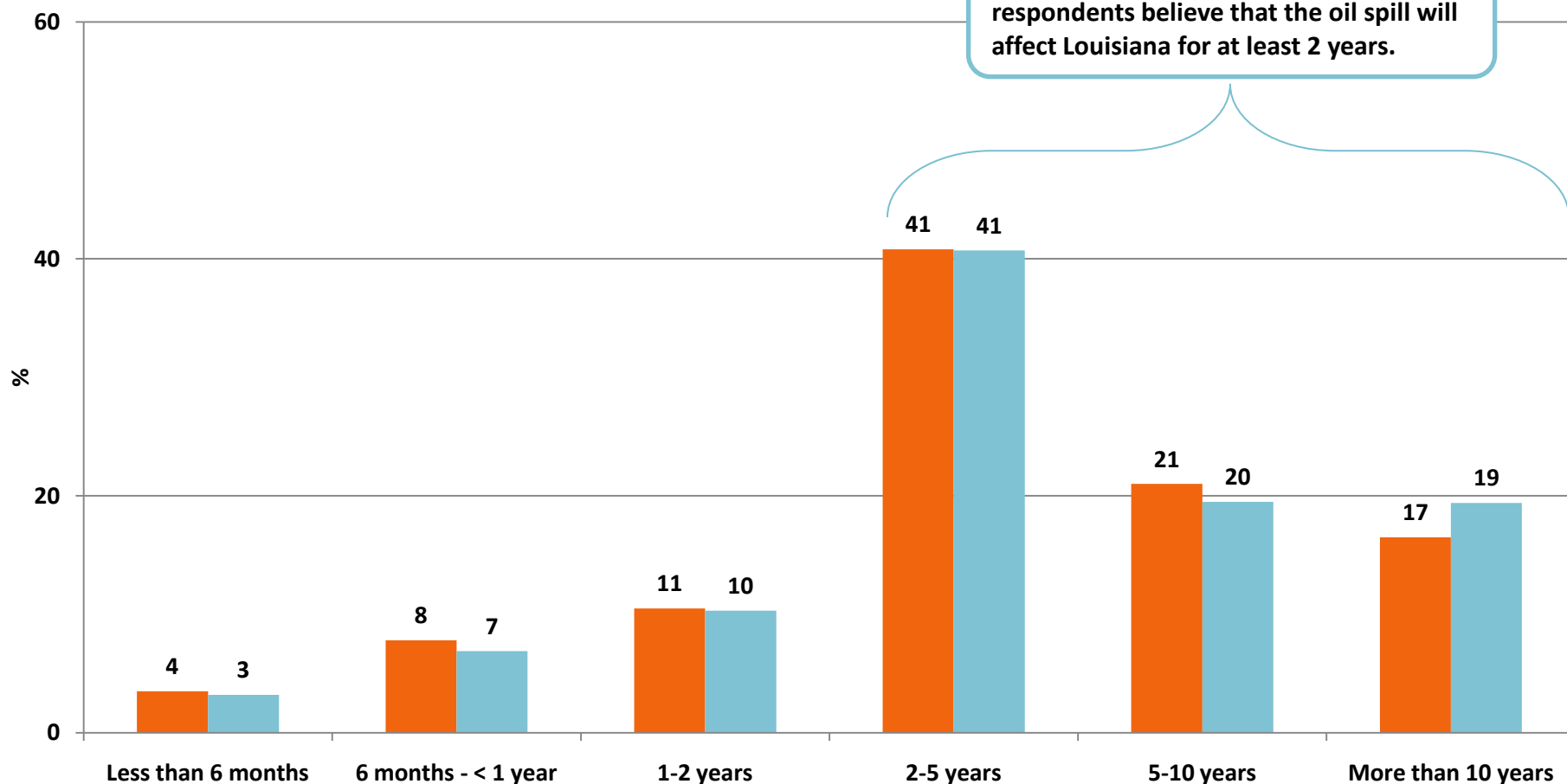


August 2010



# ...and that it will affect Louisiana for years.

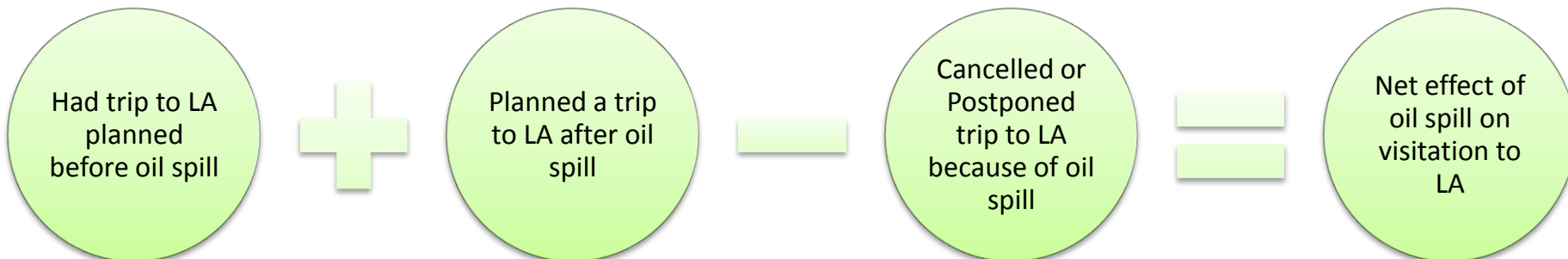
Total Respondents  
(n=1003 in each wave)



# **How has the Oil Spill Affected Travel Plans to Louisiana?**

# To answer that question, we examined travel plans to Louisiana before and after the oil spill.

- ◆ Respondents were asked to indicate how the oil spill in the Gulf had affected their leisure travel plans to Louisiana. They could select from the following list of options:
  - The oil spill caused me to plan a leisure trip to Louisiana.
  - The oil spill caused me to cancel a leisure trip to Louisiana.
  - The oil spill caused me to postpone a leisure trip to Louisiana.
  - The oil spill caused me to change the areas or attractions to visit on my leisure trip to Louisiana.
  - The oil spill had no impact on my plans to take a leisure trip to Louisiana.
- ◆ The effect of the oil spill on leisure travel plans to Louisiana was calculated as follows:
  - The number/percentage of respondents likely to visit Louisiana prior to the oil spill
  - Plus the number/percentage of respondents who planned trips to Louisiana because of the oil spill
  - Minus the number/percentage of respondents who cancelled or postponed trips to Louisiana because of the spill



# The net effect of the oil spill on visitation to Louisiana is negative.

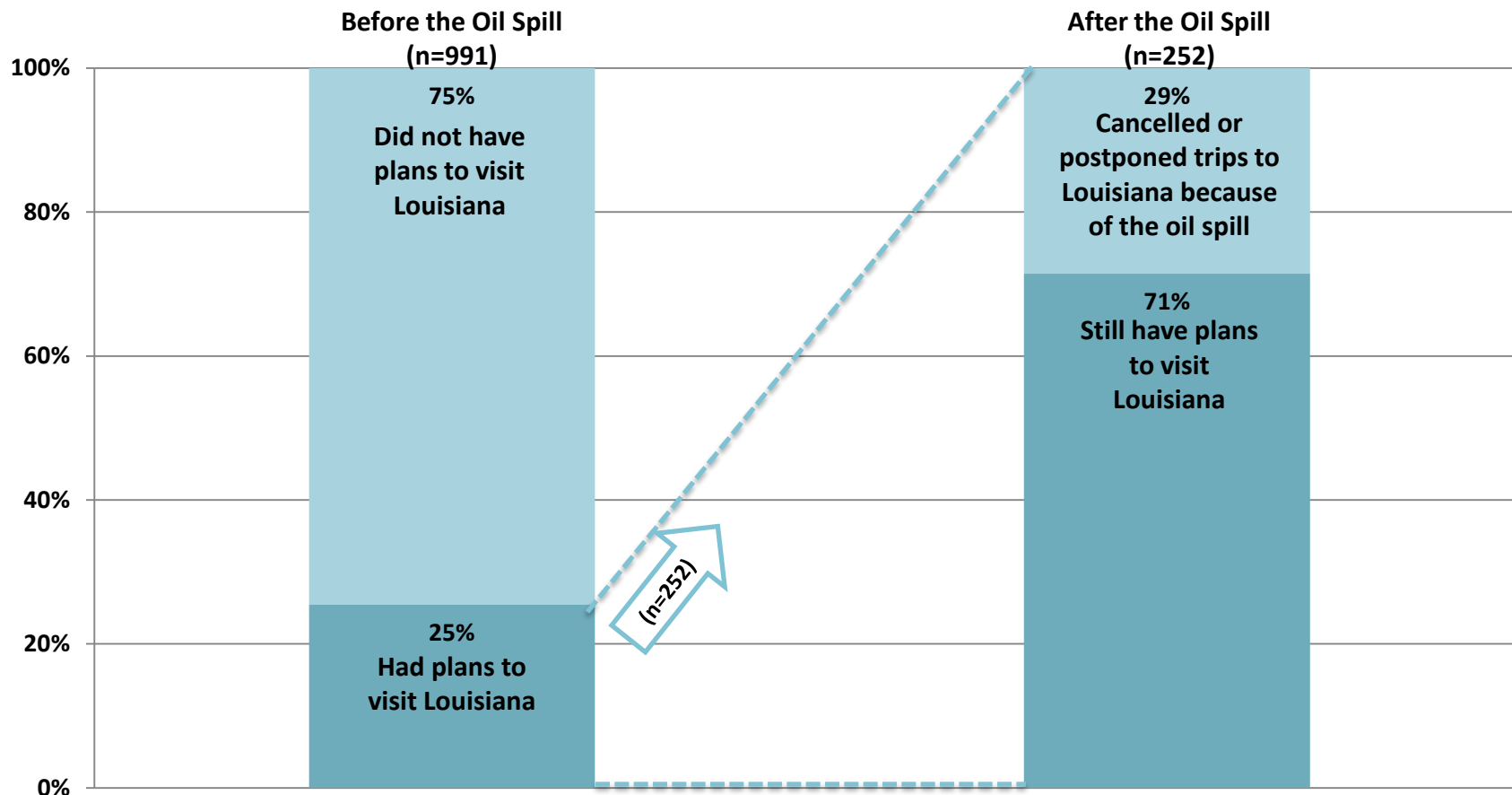
Effects of oil spill on leisure travel plans measured in 3 steps:	May 2010		August 2010	
	Number	Percentage	Number	Percentage
1. Had Plans to Visit before the Oil Spill	218	22%	252	25%
2. Made Plans to Visit after the Oil Spill	+8	+1%	+12	+1%
3. Cancelled or Postponed Plans to Visit after the Oil Spill	-57	-6%	-72	-7%
<b>Have Plans to visit</b>	<b>169</b>	<b>17%</b>	<b>192</b>	<b>19%</b>

Q2. Using a scale from 1 to 5 where "1" means not at all likely and "5" means extremely likely, please pick any number from 1 to 5 to indicate how likely you are to visit the following states for leisure or pleasure in the next 12 MONTHS: LOUISIANA

Q10. How has the oil spill affected your leisure travels to Louisiana?

# In fact, 29% of would-be visitors cancelled or postponed plans to visit Louisiana because of the oil spill.

August 2010



NOTE: Respondents who made plans to visit Louisiana after the oil spill (n=12) are excluded from the analysis.

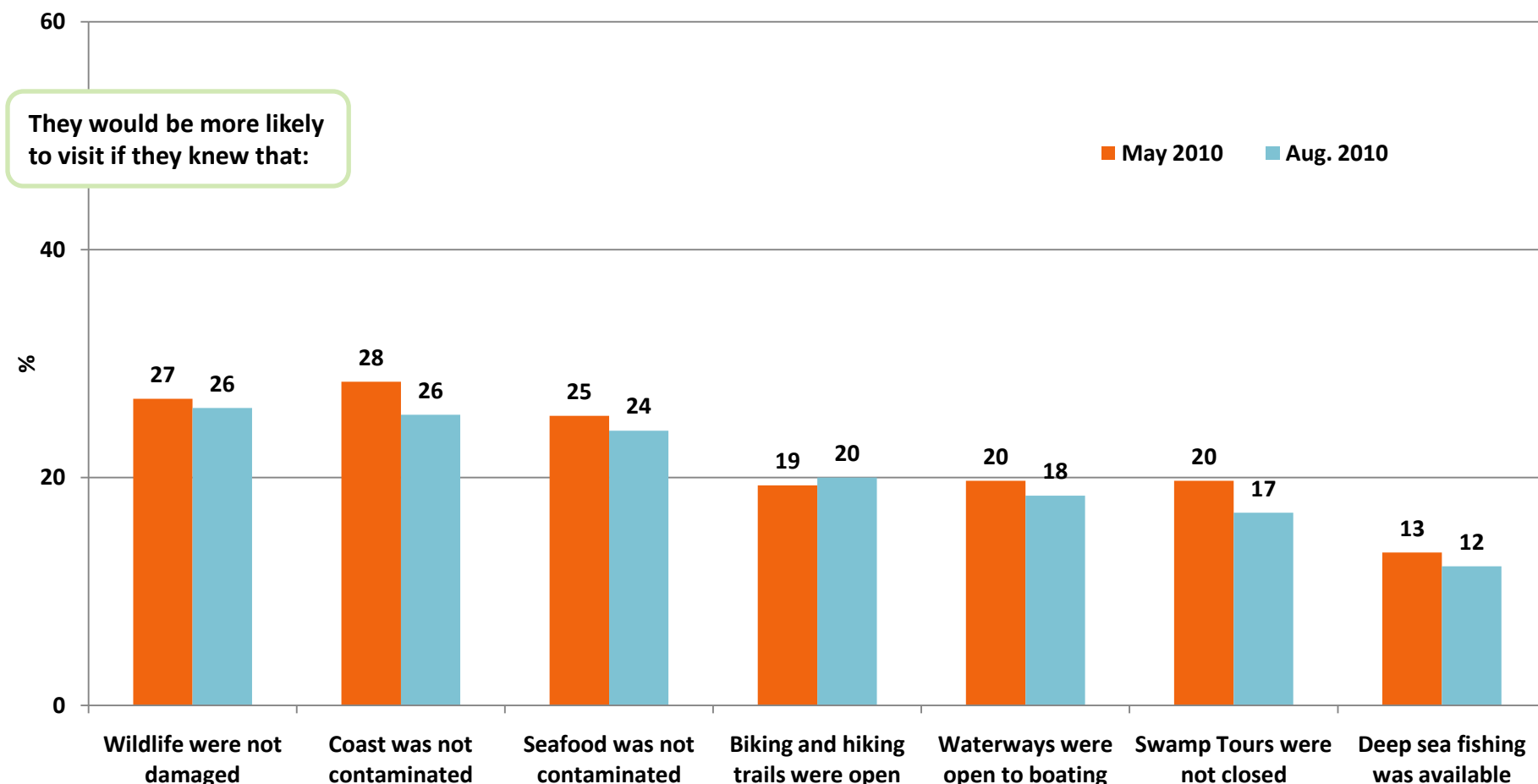
Q2. Using a scale from 1 to 5 where "1" means not at all likely and "5" means extremely likely, please pick any number from 1 to 5 to indicate how likely you are to visit the following states for leisure or pleasure in the next 12 MONTHS: LOUISIANA  
Q10. How has the oil spill affected your leisure travels to Louisiana? [Chart includes respondents who said that they either cancelled or postponed a leisure trip to Louisiana because of the oil spill.]



**What could Louisiana say that would attract visitors?**

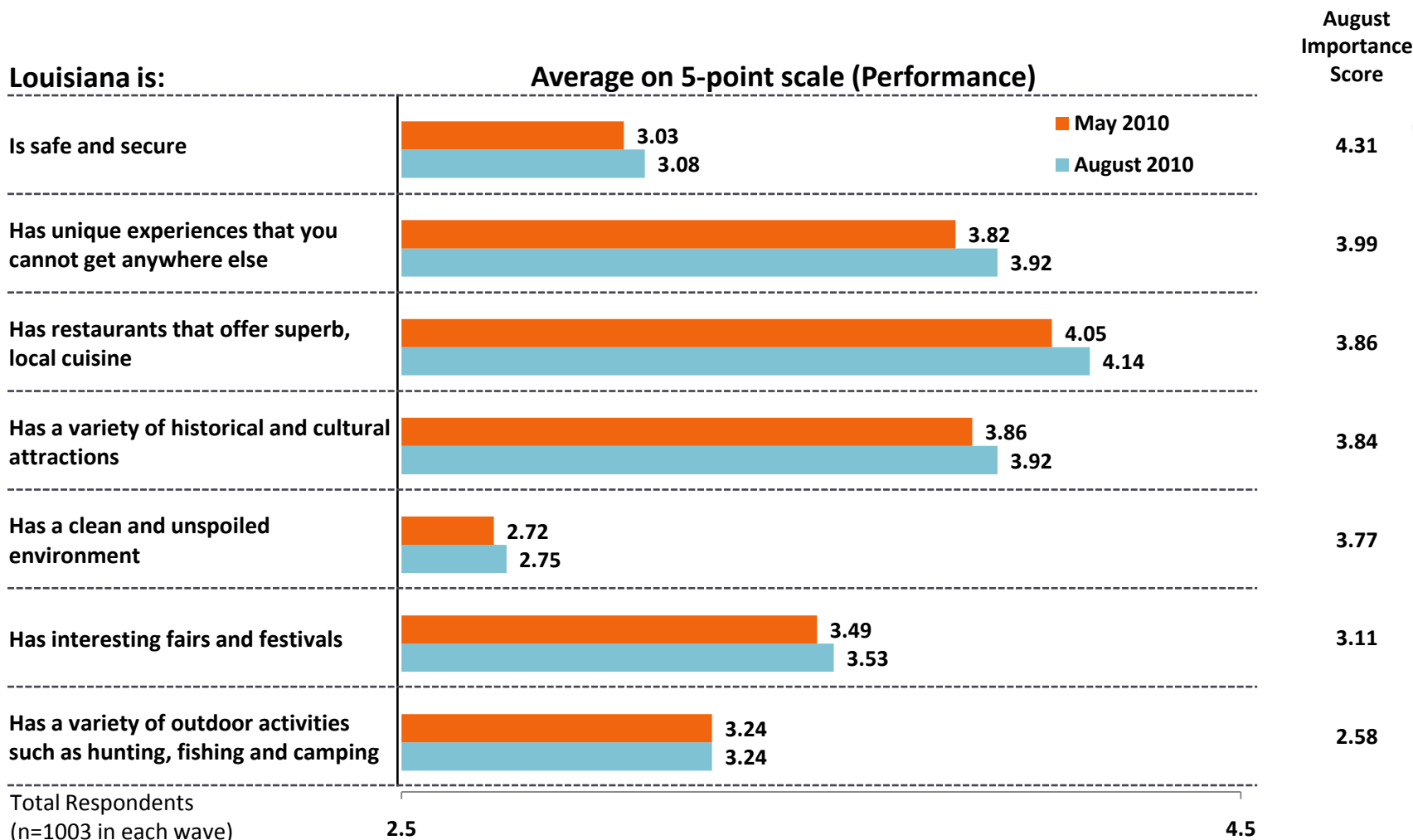
# Tell them that Louisiana wildlife, the Louisiana coast and Louisiana seafood are okay.

Among Respondents NOT likely (1-3 on 5-point scale) to visit Louisiana  
(May 2010 base=834, 83% of Respondents; Aug. 2010 base=811, 81% of Respondents)



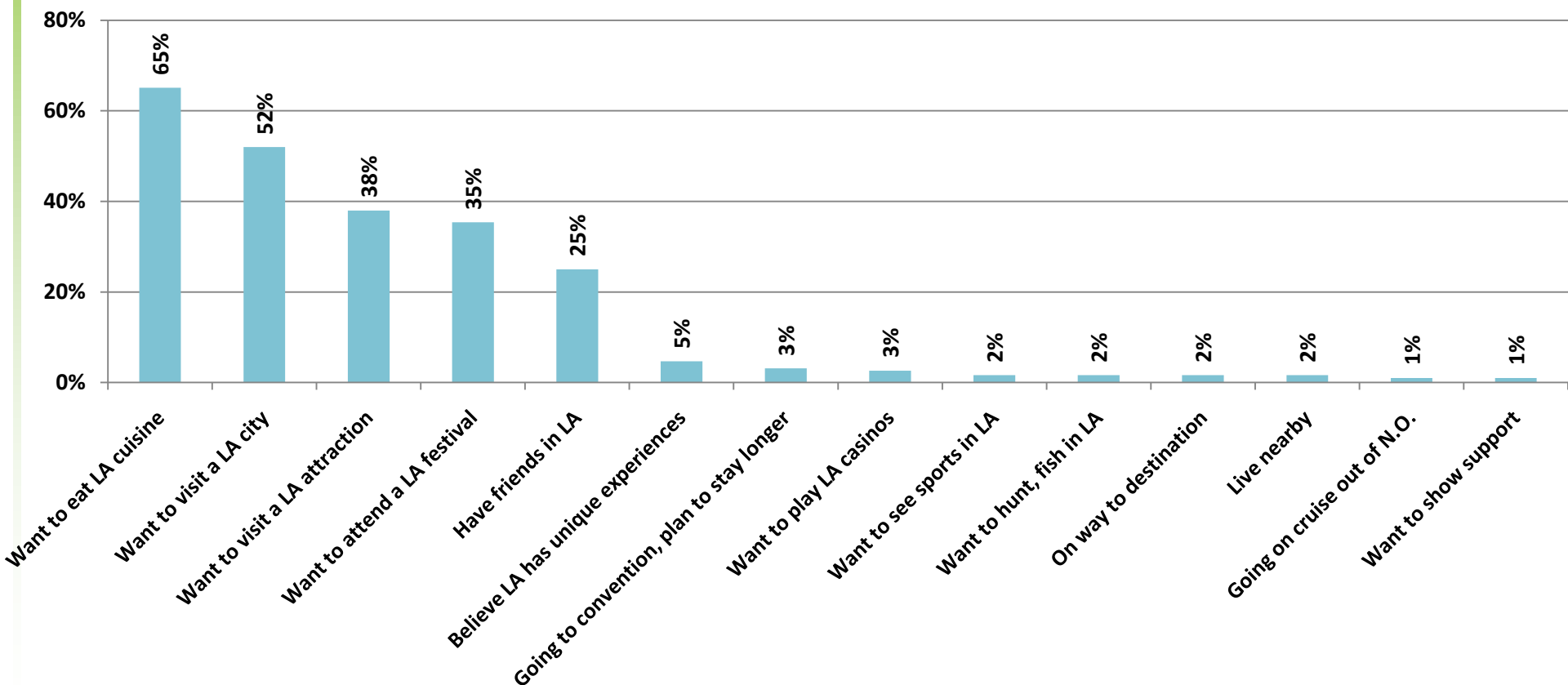
Q9. Earlier you indicated that you are not likely to visit Louisiana in the next 12 month. Please use the scale below to indicate your agreement with the list of statements about visiting Louisiana. I would be more likely to visit Louisiana if...

**Let them know that the state can offer what's important to them... *unique experiences* and *superb cuisine*.  
(The challenge will be making them feel *safe and secure*.)**



Q3/Q4. Think for a moment about when you are planning a leisure trip. Using a scale from 1 to 5 where "1" means the phrase is not at all important/does not describe LA well at all and "5" means the phrase is extremely important/describes LA extremely well, please pick any number from 1 to 5 to indicate how important the phrase is to you in terms of what you want from a leisure destination/your perceptions of Louisiana.

# Respondents who plan to visit Louisiana want to eat Louisiana cuisine. Louisiana food is the most-often given reason for selecting the state...



Among Respondents likely (4-5 on 5-point scale) to visit Louisiana  
August 2010 base=192, 19% of Respondents)

Q9.3 What led you to select Louisiana as a leisure travel destination? (Select all that apply.)

# ...and a major reason why they are not selecting Louisiana.

Among Respondents NOT likely (1-3 on 5-point scale) to visit Louisiana  
August 2010 base=811, 81% of Respondents)

One-third of unlikely visitors said that they would be more likely to visit if "Seafood was available like it was before the oil spill."

## I would visit Louisiana if:

Leisure attractions and activities were not closed because of the oil spill

33%

Seafood was available like it was before the oil spill

33%

The oil spill in the Gulf of Mexico had never occurred

26%

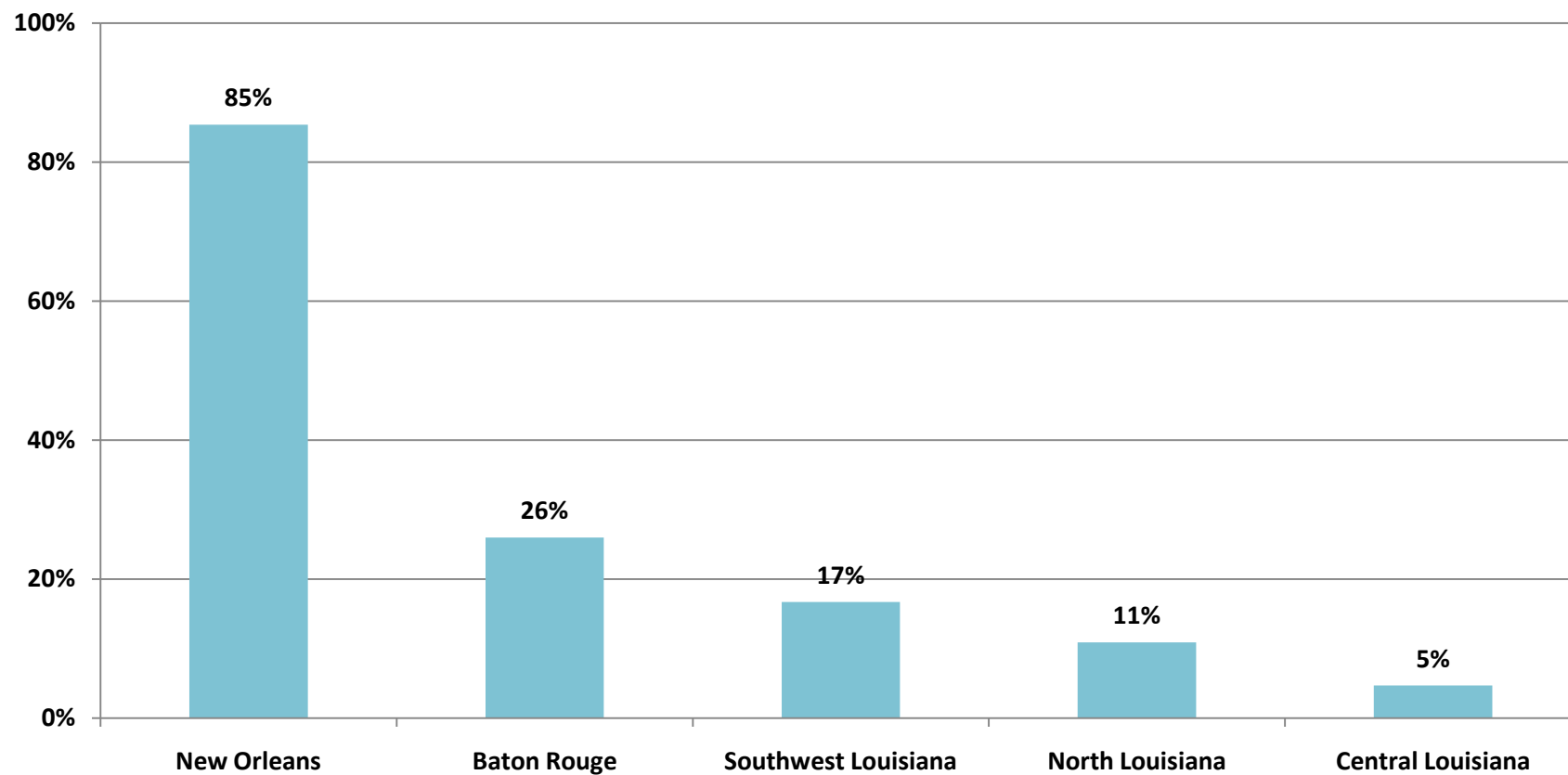
0.0%

% Agree

40.0%

# Respondents who plan to visit Louisiana are most likely to visit New Orleans.

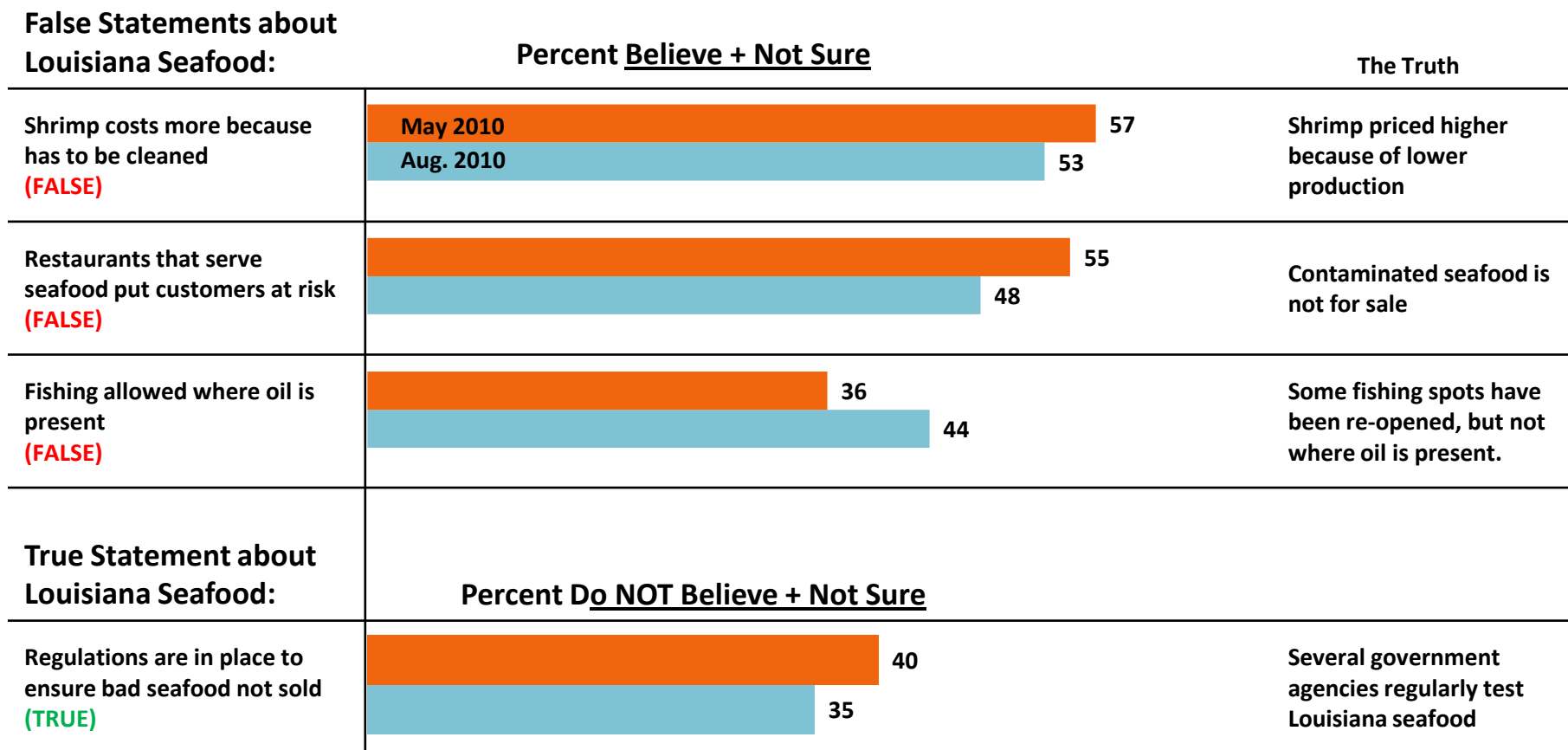
Among Respondents likely (4-5 on 5-point scale) to visit Louisiana  
August 2010 base=192, 19% of Respondents)



Q9.2 Earlier you indicated that you are likely to visit Louisiana. Which of the following areas of Louisiana do you plan to visit? (Select all that apply.)

**What specifically should be said about Louisiana seafood?**

# Let people know that contaminated seafood is not for sale, regulations are in place to ensure consumer safety.



Total Respondents  
(n=1003 in each wave)

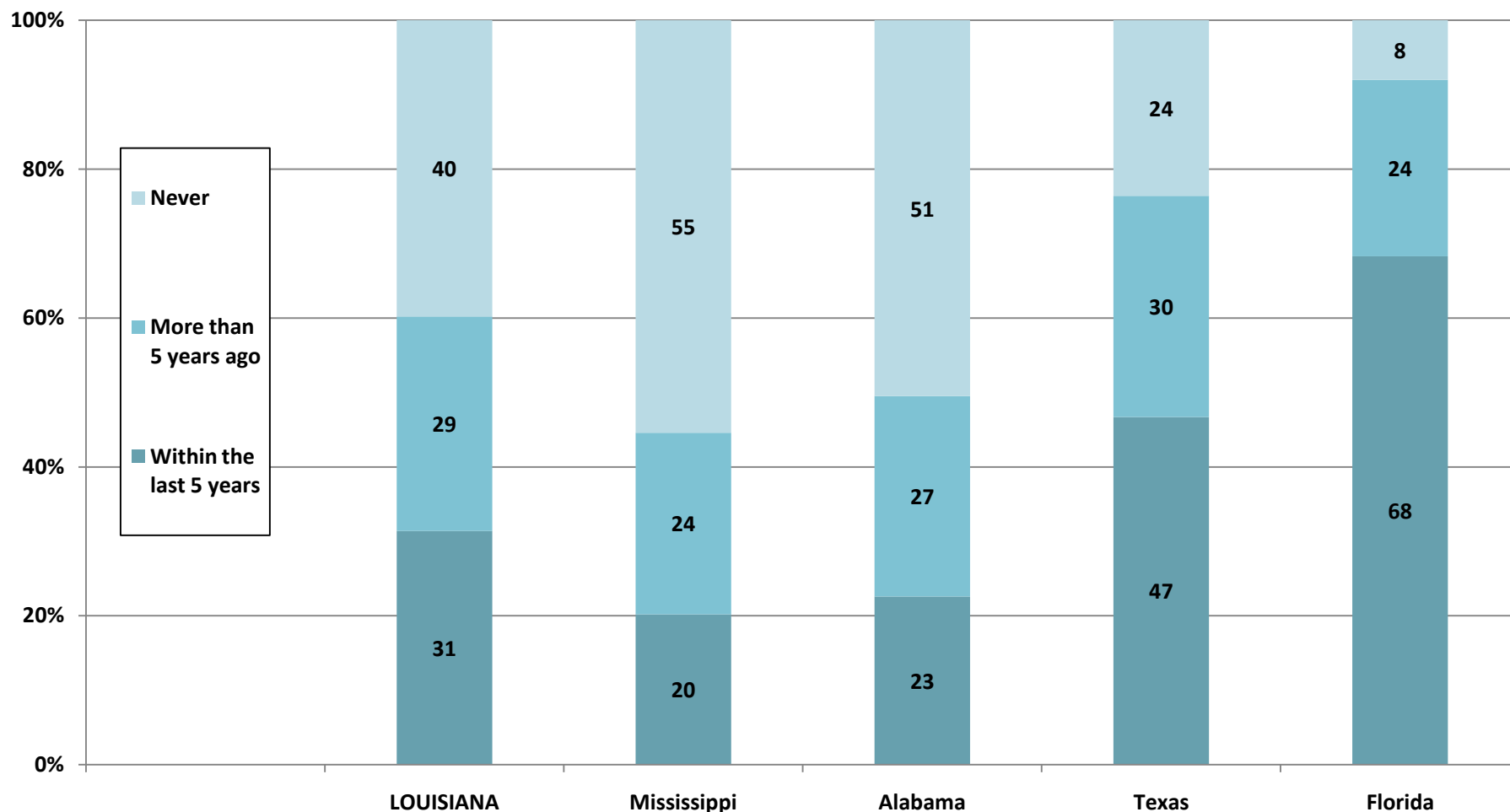
Oil began spilling from an oil well on April 20, 2010 after an oil rig exploded in the Gulf of Mexico about 50 miles off the coast of Louisiana. Since mid-July 2010, the oil spill has been contained with a temporary cap. Q6. Considering this information and anything else you may have heard about the oil spill, please indicate whether you believe each of the following statements about Louisiana seafood.



# Respondent Profile

# Last Time Visited Gulf Coast States

Base: Respondents who do not live in the state  
(n=1003 total)



# Respondent Profile

Respondent base (n=1003)

<b>Educational Attainment</b>	<b>May 2010</b>	<b>Aug. 2010</b>
No college	9	6
Some college	19	17
College graduate	38	32
Post-graduate work or degree	35	44

<b>Race/Ethnicity</b>		
White	85	83
Black/African-American	4	7
Asian	4	3
Hispanic	5	6
Other	2	2

<b>Household Income</b>		
\$50K to under \$75K	38	40
\$75K to under \$100K	28	27
\$100k to under \$125k	17	12
\$125k and over	17	21

Units: %

<b>Age</b>	<b>May 2010</b>	<b>Aug. 2010</b>
20-35	22	18
36-55	36	38
56 and older	42	44

<b>Gender</b>		
Male	53	48
Female	47	52

<b>Household Composition</b>		
Single, no children	17	22
Single, with children	2	3
Married/Living with partner, no children	50	51
Married/Living with partner, with children	31	23

# Appendix: Questionnaire

⇒ Separate Document

# Thank you